

DRAFT
POSITION DESCRIPTION

I. POSITION

TITLE: **Employer-Union Health Trust Fund Administrator**

POSITION NUMBER:

DEPARTMENT: Department of Budget and Finance

DIVISION: Hawaii Employer-Union Health Benefits Trust Fund

GEOGRAPHIC LOCATION: Honolulu

II. INTRODUCTION

The purpose of the Employer-Union Health Benefits Trust Fund is to provide state and county employees, retirees, and their dependents with health and other benefit plans at a cost affordable to both public employers and public employees and to defray the administrative and other expenses of the Trust Fund. A board of trustees representing public employers and employee-beneficiaries is appointed by the Governor to administer the Trust Fund.

The Board-appointed Trust Fund Administrator is responsible for and directs all of the administrative activities of the Trust Fund within the policies, directives and standards established by the Board and state and federal statutes and regulations.

III. MAJOR DUTIES AND RESPONSIBILITIES

Trust Fund Administration 80%

1. Attends all Board meetings to report on Trust Fund operations.
 - Reports on Trust Fund activities, including the Trust Fund's operational budget, administrative operating costs, Trust Fund investments, and the financial status of the Trust Fund.
 - Reports on significant complaints, comments and inquiries of participants, insurance carriers, and other interested parties.
 - Reports on state and federal legislative activities and advises on its impact on the Trust Fund's operations.
 - Reports on other administrative activities as appropriate.
2. Provides secretariat services for all Board meetings and prepares and provides information necessary for each meeting's agenda items. Provides administrative support services to the Board and Board committees as necessary or requested.

3. Implements Board policies and directives by developing plans, timetables, and strategies for implementation.
 - Recommends revisions or new policies to improve cost-efficient administration.
4. Directs the development and execution of the Trust Fund's operational budget to assure that necessary resources are available to meet program objectives and satisfy fiscal and legislative requirements.
 - Monitors administrative operating costs to assure expenses are maintained within established budget.
 - Assesses Trust Fund operations and institutes improvements for cost-effective administration.
3. Manages the Trust Fund's assets to minimize risk of large losses.
 - Directs investment of Trust Fund assets according to Trust Fund policy or by Board directive.
 - Monitors investment activities of investment advisor through review of accounting and investment reports and statements.
4. Directs the administration of Trust Fund benefit plans to ensure compliance with Board policies, Trust Fund rules, state and federal statutes and regulations, and plan documents.
 - Oversees the implementation of benefit plans sponsored or offered by the Trust Fund.
 - Evaluates the benefit plans offered by the Trust Fund to ensure that the benefits offered continue to be cost affordable to the employers and public employees.
 - Monitors and evaluates benefit plans usage and assesses vendor contracts and performance. Provides reports and recommendations to Board.
 - Evaluates benefit trends and proposes alternatives with cost analyses. Recommends changes to existing plans or new plan designs for more cost-effective programs.
6. Directs the procurement of vendors and other contract services.
 - Solicits proposals from vendors and for other contract services in accordance with Board specifications.
 - Acts as Trust Fund contact for vendors on bids and specifications.
 - Evaluates proposals and formulates recommendations that are presented to the Board for decision.
 - Participates in the negotiation of contracts with vendors.
7. Oversees the development of participant communications and Trust Fund information that is provided to participants, employers, employee organizations, and individuals involved in the administration of the benefit plans, e.g., department personnel officers and payroll and fiscal personnel.

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8. Oversees the design, development, and implementation of Trust Fund record keeping systems by working with professionals in developing systems that will accommodate Trust Fund policies and accurately maintain the required information.
9. Acts as the Trust Fund's liaison with the department of budget and finance, legislature, news media, and other interested organizations.

Legislative Activities

10%

1. Develops state legislative bills and testimony on behalf of the Trust Fund and at the direction of the Board.
2. Reviews, evaluates, and advises the Board on proposed state legislative bills which impact the Trust Fund and develops testimony for such bills as appropriate.
3. Attends legislative committee hearings to provide testimony or briefings on Trust Fund budget, benefit plans, or other related matters. At the direction of the Board, lobbies the legislature on issues relating to or affecting the Trust Fund.

Program Planning

10%

1. Assists the Board in establishing objectives for the Trust Fund's long-range objectives. Develops and implements plans to accomplish those objectives.
2. Periodically reviews existing Trust Fund policies and polices to evaluate effectiveness of current operations.
 - Recommend changes to Trust Fund policies and procedures to improve operations and decrease administrative costs.
 - Develops and implements plans or systems to improve Trust Fund operations.
3. Periodically reviews Trust Fund records to determine if records are accurate and current; correctly measures the effectiveness of benefit plans, eligibility rules, and cash management; and ensures that valid interpretation of plan documents are maintained.

IV. POSITIONS SUPERVISED

- Assistant Administrator
(Directs the day-to-day operations overseeing enrollment and member service; supervises HF Assistant)
- Accounting Manager
(Directs accounting activities)
- LAN Administrator

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(LAN Administrator and HIPAA Security Officer)

- Communications/Regulations Compliance Officer
(Communications Specialist who monitors federal and state regulations relating to employee benefit programs and acts as HIPAA privacy officer)
- Secretary
(Supports administrator and Board; acts as office manager)

V. CONTROLS EXERCISED OVER THE WORK

Supervisor: Board of Trustees (Chairperson)

Nature of Control: Works independently under broad polices and direction of the Board of Trustees.

Type of Controlling Guidelines Available:

- Chapter 87A, Hawaii Revised Statutes
- Other statutes, rules, regulations and professional standards relating to the administration of employee benefit plans.

VI. STANDARDS OF PERFORMANCE *(What specific minimum achievements are expected; linked to salary increases; exempt employees do not have a formal appraisal system available at this time)*

For example:

1. Maintain administrative costs within 9-11% of Trust Fund value.
2. Other standards or benchmarks that must be attained to meet satisfactory work performance

VII. MINIMUM QUALIFICATIONS *(What qualifications are needed to be successful; links with goals of EUTF Board)*

Graduation from an accredited college or university in the area of human resources management, business, finance or related areas. Substitution of experience for education allowed.

Five years or more experience as a manager of health and employee benefits programs that had a minimum of xx,000 participants and included retired employees. Experience with an employer-union or multi-employer program preferred.

The experience must have included presenting proposals, recommendations, or information to executive level managers, plan design and working with specific employee benefit laws (list)
and experience in evaluating proposals and negotiating benefit plans with vendors.

Professional Certifications

Any of the following certifications are preferred but not required:

- Certified Employee Benefits Specialist (CEBS)
- Certified Public Accountant (CPA)
- Certified Life Underwriter (CLU)
- Certified Financial Planner (CFP)

VIII. KNOWLEDGE, SKILLS, AND ABILITIES *(What KSA are needed to perform the work)*

(For administration of benefit plans)

- Comprehensive knowledge of employee benefit programs including statutes and policies governing their administration
- Ability to interpret and apply laws or policies specific in the areas of insurance and benefit programs.

(For evaluation and design of plans)

- Knowledge of benefit plan design and administration and plan cost structures
- Operational knowledge of health care providers, managed care systems or related benefit plan administration areas.
- Knowledge of and application of actuarial and/or underwriting principles.
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(For managing trust fund activities)

- Working knowledge of the principles and practices of management, finance and financial investments.
- Strong organizational and planning skills.
- Ability to direct and conduct studies and research projects in the areas of cost containment, risk management, managed care and related areas.
- Strong analytical skills
- Ability to take high-level strategies and implement detailed systems successfully.

(For working successfully within the system)

- Working knowledge of the legislative process and procedures.
- Working knowledge of collective bargaining and negotiation, management/employee issues, labor/employee relations
- Strong oral and written communication skills.
- Ability to work effectively with state legislature, county councils, insurance carriers.
- Ability to present proposals to executive level managers
- Strong interpersonal relation skills